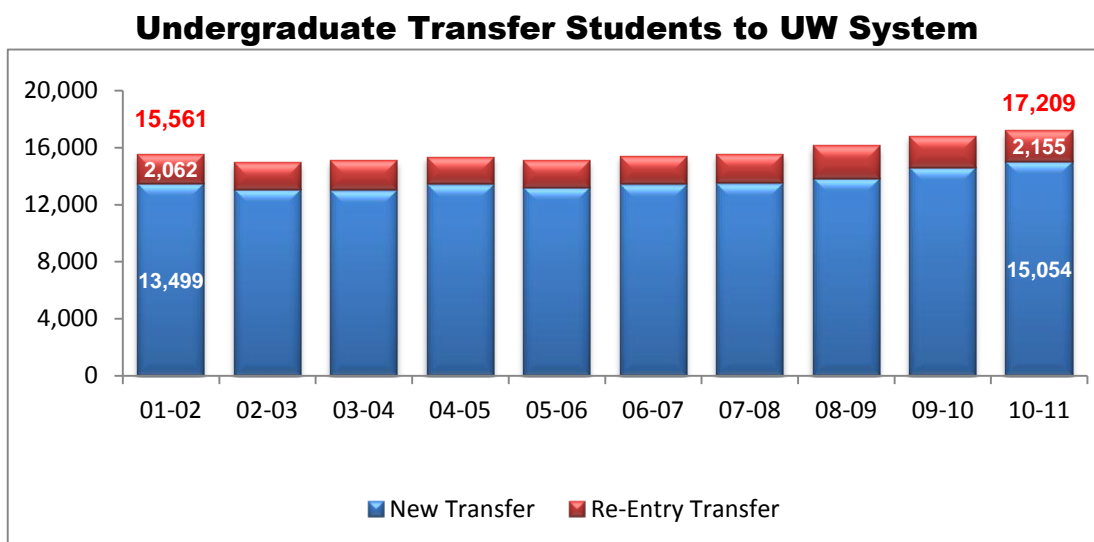


**Special Legislative Task Force on UW Restructuring and Operational Flexibilities**  
**Prepared by UW System Administration**  
**TRANSFER: Background, Issues, Recommendations**  
**February 27, 2012**

**I. Background**

Transfer among UW institutions has been a focus of the UW System since its inception in 1971. One of the benefits of establishing a System was to be able to more easily and intentionally address the needs of transfer students and support the movement of our students between and among UW institutions. This commitment and need has only increased during the last 40 years as student mobility and “swirling” has become the norm for students pursuing higher education nationally and in our state. UW institutions and UW System Administration pay close attention to transfer patterns among our students and engage in programs and initiatives to continually strengthen transfer relationships among our own institutions and with the Wisconsin Technical College System.

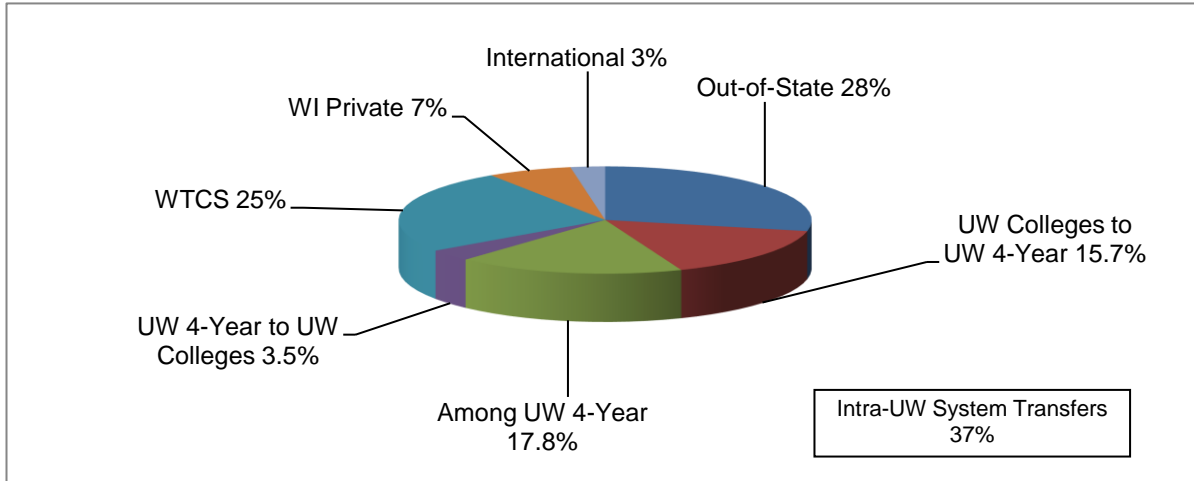
The UW System publishes an annual *Transfer Informational Memorandum* to provide the data we need to continually assess and improve transfer. During the 2010-11 academic year, more than 17,000 students successfully transferred credits from another postsecondary institution into or within the UW System. This was the largest number of transfer students since the UW System was created in 1971. The majority of transfer students (87%) were new transfer students who transferred to a UW System institution that they had not previously attended.



Of the 15,054 new transfer students in 2010-11: 37% transferred between UW institutions; 28% from out-of-state institutions; 25% from the Wisconsin Technical College System (WTCS); 7% from Wisconsin private institutions; and 3% from international institutions.

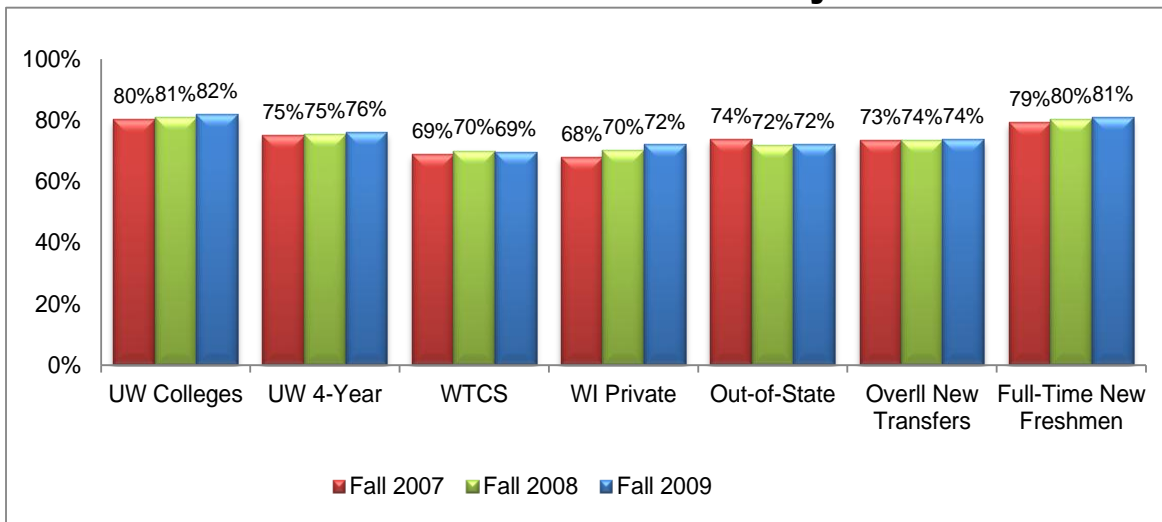
Among UW institutions, UW-Milwaukee received the most new transfer students (2,532), followed by UW-Madison (1,715), UW Colleges (1,514), and UW-Oshkosh (1,468).

### UW System New Transfer Students, 2010-2011



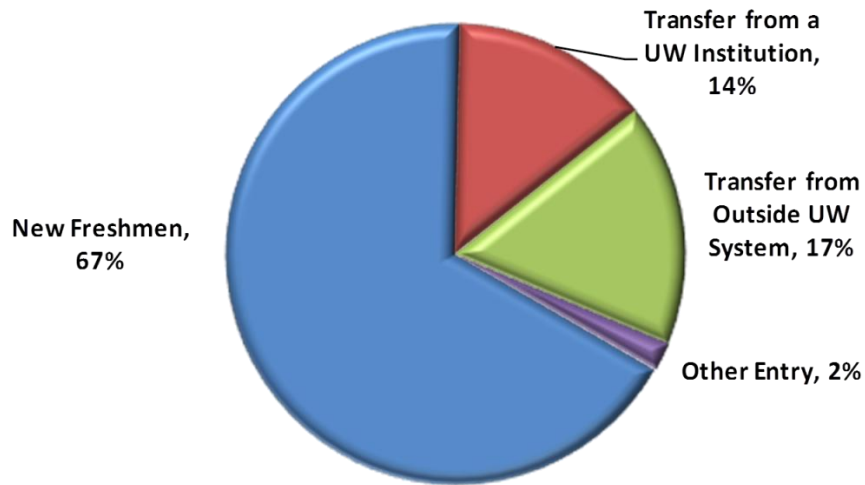
Transfer students are successful once they come to UW institutions. The grade point average (GPA) for fall 2009 transfer students during their first year after transfer was an average of 2.9 on a scale of 4.0 which is identical to the GPA of new freshmen in the UW System. In terms of 2<sup>nd</sup> year retention, 74% of the transfer students were retained for a second year of study. The 2<sup>nd</sup> year retention rate varies from a low of 69% to a high of 82% depending on the institutions they were transferring from.

### 2<sup>nd</sup> Year Retention Rate: New Transfer Students to UW System



The importance of transfer to the UW System can also be seen in the data that show almost one-third of graduating students entered their degree granting institution as a transfer student.

### **Type of Entry of 2009-10 UW Bachelor's Degree Recipients**



Recipients receiving first UW bachelor's degree during 2009-10; entry at UW institution graduated from.

## **II. UW System Transfer Initiatives**

The success of transfer students is not accidental. As a System, and a state, we have given transfer issues constant review and attention. That effort has involved a wide range of programs, initiatives, and services. Recently, UW System has championed the following efforts to serve transfer students and to provide data that enables our institutions to monitor and continuously improve the transfer process.

- **The Annual UW System Accountability Report** includes a section on “Access for Transfer Students” with the goal of increasing the number of transfer students in the System. <http://www.wisconsin.edu/opar/accountability/invest11/system.pdf>
- **The UWS Transfer Student Info Memo** is an annual report on transfer within UW System and also between WTCS and UW institutions. [http://www.wisconsin.edu/opar/orb-im/im/transfer/ts\\_0910.pdf](http://www.wisconsin.edu/opar/orb-im/im/transfer/ts_0910.pdf)
- **The WTCS/UWS Program Assessment Study and Executive Summary** is an annual report which: (1) tracks students who were enrolled at the WTCS and subsequently enrolled at the UWS, identifying both their originating WTCS program and subsequent UWS major; (2) identifies potential program areas for developing new transfer articulation agreements; and (3) assesses the academic outcomes of these students, including retention and graduation. [http://www.wisconsin.edu/opar/reports/transfer/prog\\_assess\\_2011.pdf](http://www.wisconsin.edu/opar/reports/transfer/prog_assess_2011.pdf) and [http://www.wisconsin.edu/opar/reports/transfer/exsum\\_pas11.pdf](http://www.wisconsin.edu/opar/reports/transfer/exsum_pas11.pdf)

- **The Transfer Information System (TIS)** (<http://tis.uwsa.edu>) is a web-based interactive program that allows UW System and WTCS students and advisors to see how credits will transfer to all other UW institutions or WTCS campuses. It also includes links to campus catalogs, UW and WTCS home pages, contact information for transfer specialists at UW and WTCS campuses, as well as links to resources on admissions, financial aid, housing and others. For over two decades TIS has been continuously improved to provide successively more complex and sophisticated transfer information, evolving from a system of shared floppy disks, into a student-friendly web interface that is used to plan for a successful transfer.

In 2011-12, TIS was enhanced with 'Transfer Plans' that provide 'what-if' degree audit information for transfer students so that they can know how courses taken at a UW institutions or WTCS institution will apply to specific degree programs. The program was piloted with UW-Madison in 2011. Over the next four-to-five years, all UW institutions will be added to the system in order to offer this Transfer Plan capability.

- **Undergraduate Course Transfer Data:** Based on a review of the courses and course equivalencies contained in the Transfer Information System (TIS) database, almost all courses transfer internally between UW System institutions. The TIS database includes course records for over 11,000 freshman/sophomore level courses. These 11,000 freshman/sophomore university-level courses generate nearly 119,000 transfer course equivalencies between the UW institutions. TIS focuses on freshman/sophomore level course equivalencies as students frequently transfer during their first two years of college. Of these 119,000 transfer course equivalencies, 117,000 (over 98%) transfer for credit towards a degree.
- **The Transfer Coordination Group (TCG):** TCG is a systemwide committee of representatives from all UW institutions with transfer expertise. The group meets twice a year and shares best practices and discusses policy regarding transfer. One of these meetings is often held jointly with WTCS Transfer Coordinators. An example of a best practice that might be highlighted at a TCG meeting are the special transfer student orientation programs now offered by some UW institutions to support a successful transition experience.
- **Undergraduate Transfer Policy Revision:** The UW System Undergraduate Transfer Policy ([http://www.wisconsin.edu/acss/acis/ACIS\\_6.0\\_revJune11.pdf](http://www.wisconsin.edu/acss/acis/ACIS_6.0_revJune11.pdf)) is periodically reviewed and updated and was recently revised in spring 2011. The revisions have included making a number of accommodations (that had previously been only for certain categories of transfer students) standard for all transfer students, and removing limits on the number of general education credits that could be accepted in transfer from WTCS Applied Associate Degree programs. These improvements should assist students in the transfer of credit within the UW System as well as between WTCS and UWS.
- **Transfer Contacts/Advocates and System Ombudsperson:** Each UW institution identifies a Transfer Contact (<http://tis.uwsa.edu/contact/tfrcontacts.shtml>) to provide basic transfer information, and a Transfer Advocate (<http://tis.uwsa.edu/resources/uwadvocates.shtml>) to address issues or problems regarding transfer. If issues are not resolved at the institutional level, there is also a UW System Ombudsperson for Transfer who works with the Provosts to address unresolved

concerns. A future initiative is to review the role of the transfer advocates and their ability to influence transfer decisions that are made by faculty.

- **Prior Learning Assessment Committee and Lumina Initiative:** The UW System Prior Learning Assessment (PLA) Initiative, funded in part by Lumina Foundation for Education, supports development, expansion, and coordination of PLA activities within UW System institutions. A UW System PLA Academic Planning and Policy Task Force (Task Force) was appointed in November 2010. The Task Force examined current PLA methodologies, policies, and practices within the UW System and at peer public institutions and systems to guide coordination and expansion of prior learning assessment across the UW System. The Task Force recommendations can provide helpful guidance to institutions that are beginning or expanding student opportunities to earn credit through prior learning experience and may be used to facilitate the development of PLA methods, policies, and practices. In addition, the findings will provide a basis for in-depth systemwide discussion about current PLA practices, the degree to which practices may be coordinated, and the implications for UW System policy on transfer and transcription.
- **WIN/WIN Initiative:** Project Win-Win is a national initiative that identifies former students whose records would either qualify them for associate degrees or place them in line to complete an associate degree in a very short amount of time. Four UW institutions are participating in the Win-Win initiative during academic years 2010-2011 and 2011-2012. The findings of this study, to date, identified up to 3,800 former students that have not earned any degree from a post-secondary institution and may be within 9 credits of earning an associate degree at one of the four UW System institutions involved in this project. Issues relating to transfer are frequently involved in both the awarding of the degree as well as the assessment of students who are close to receiving an associate degree from their first institution but have transferred to another institution. In such cases the student may have earned significant credit at the transfer institutions, some of which may not offer associate degrees.
- **Quality Collaboratives Project:** Quality Collaboratives is an Association of American Colleges & Universities (AAC&U) sponsored project with funding from the Lumina Foundation. The project is designed to study a set of new national reporting templates and strategies for assessing student competence and essential learning outcomes as they apply to student transfer. Participating institutions and systems will focus on improved transfer of students from two- to four-year institutions as the means to persistence and degree completion. The project will involve staff from UW System Administration and four three-person teams with expertise in policy, assessment and faculty development from each of two UW four-year institutions and from UW two-year partner institutions.

The UW System continues to also address transfer between UW institutions and the Wisconsin Technical College System by means such as:

- **Articulation Agreements:** UW System institutions have over five hundred articulation agreements with WTCS institutions, and with private colleges and universities within and outside of Wisconsin. These agreements are specifically designed to provide a seamless pathway from the curriculum of a two-year technical program to a UW baccalaureate

program and reduce the need for students to repeat coursework after transferring. Agreements involving WTCS or UW institutions are published on the Transfer Information System (TIS) website (<http://tis.uwsa.edu/resources/ga/agreements.shtml>). UW System works with institutions to ensure that these agreements are regularly reviewed and updated, posted electronically and linked through TIS. They also work with UW institutions and with WTC System staff to develop strategies to develop more robust agreements that allow students to transfer a significant portion of credit completed at the first institution. Conversations are ongoing to share models for articulation agreements in popular programs such business administration and engineering that will allow students with applied associate of science degrees in these areas to transfer close to 60 credits from their WTCS program.

UW System has also recently revised the Guidelines for WTCS/UWS Articulation Agreements ([http://www.wisconsin.edu/acss/acis/ACIS\\_6.2revJune11.pdf](http://www.wisconsin.edu/acss/acis/ACIS_6.2revJune11.pdf)) so the agreements are written in ways that provide students full and accurate information about what courses will be accepted in transfer and what credits for the baccalaureate degree will remain to be completed at the transfer institution.

- **WTCS to UW Transfer:** There are several ways for students transferring from Wisconsin Technical Colleges to earn degree credit upon transfer:
  1. Students transferring from the WTCS Liberal Studies (college transfer) program at Madison Area, Milwaukee Area, Nicolet Area, Chippewa Valley, or Western Technical College may transfer up to 72 credits to any UW campus.
  2. Courses from WTCS applied associate degree occupational/technical programs may be accepted by UW institutions in one of three ways. In determining transferability of these courses, each UW institution takes into account the quality and comparability of the coursework and its applicability to degree requirements:
    - a) WTCS general education courses in communications, social sciences, behavioral sciences, mathematics, and natural science may transfer for degree credit.
    - b) UW and WTCS institutions have over 500 transfer articulation agreements that permit WTCS students enrolled in specific associate degree programs to transfer occupational/technical courses to a related program at a UW institution.
    - c) Some occupational/technical courses from WTCS applied associate degree programs may transfer without being part of an articulation agreement. Currently TIS includes almost 1,000 transfer course equivalencies to UW institutions for occupational courses.
- **Transfer Equity Study:** The Wisconsin Transfer Equity Study, completed in November 2010, was designed to enhance equity, or parity of outcomes, between students of color and their white peers in transfer and baccalaureate attainment. The Study involved two-year collaboration among the UW System, the Wisconsin Technical College System, and the Center for Urban Education at the University of Southern California, that sought to identify and address barriers to transfer for students of color in the partner institutions. Study recommendations included: strengthening the UW System accountability report to include data on access for transfer students, especially students of color; setting intra-system equity transfer goals for students; and strengthening articulation agreements and accommodations for students transferring from WTCS institutions, among others. Some

of these recommendations were addressed in the revised transfer policy that was approved by the Board of Regents at the June 2011 meeting.

### **III. Recommendations**

Transfer has been and will continue to be a high priority for the UW System. We will continue publishing focused transfer information and including transfers in accountability reporting, developing electronic and web-based resources for students to make the transfer process simpler and more transparent, and encouraging equivalency evaluations and articulation agreements between and among UW institutions and with Wisconsin Technical Colleges.

Wisconsin is working to enhance the ease of transfer among public higher educational institutions on many fronts. Since the 1990's Wisconsin has had a successful and nationally respected state-wide Transfer Information System (TIS). Wisconsin's TIS provides many of the identical benefits that some states have sought through uniform curriculum or numbering systems, and TIS avoids the disadvantages of: 1) added expensive state-wide bureaucracy requiring large outlays of new resources, 2) curriculum that becomes rigid or antiquated because of the complex process required to make state-wide changes, and 3) compromising or circumventing state statutes regarding faculty governance.

In the coming biennium, UW System will continue to enhance transfer through new efforts to ensure that UW institutions provide full and easily accessible information about existing articulation agreements; offering training to academic advisers to help students plan for a successful transfer and avoid unnecessary coursework; and assisting in the establishment of inter-institutional collaborations that help students bridge the transition from one institution to the next.

For more than 30 years the UW System has continually worked with partners at the Wisconsin Technical College System and within the UW System to study transfer data and to improve the ease and transparency of the transfer process. These steady and incremental improvements have built a strong system of statewide transfer. Whenever we have received dedicated state funding, we have been able to make major improvements that have had long lasting impact. The current Transfer Information System (TIS) is a major highway system that can always benefit from infrastructure improvement. The system is strong and we have come to rely on it, but like any infrastructure, it benefits from regular maintenance and attention. There are a number of ways the ease of transfer, transfer services, and transfer information could improve if additional funding were available to support the efforts. These include:

#### **1. Modernize TIS**

TIS, the web-based core of statewide transfer information, was redesigned in 2005. The technical architecture behind the user interface was rebuilt and fundamentally improved in 2010; however, the 'front-end' user-interface, the look and feel for the site, is now six years old. Funds to support a redesign that is more consistent with current webpage styles could attract and offer a more familiar browsing environment for today's students. New resources could support the redesign of the site as well as support the development of new capabilities, such as making appropriate sections compatible for mobile devices.

2. Support TIS Transfer Plans at all UW institutions

Provide funding so all UW institutions can offer transfer students ‘what-if’ degree audits that tell students not only if courses will transfer, but also how they will apply to specific academic majors. UW System began the Transfer Plan initiative in 2008 with pilot funding provided by the State. Expanding the pilot to all UW institutions and continuously funding it would benefit thousands of transfer students each year.

3. Expand TIS to Include Wisconsin Private Colleges and Universities

Currently, TIS includes only public institutions of higher education in Wisconsin. Including Wisconsin private colleges and universities would make the system truly statewide.

4. Expand UW HELP

In addition to TIS, the other jewel of statewide higher education information is the UW Higher Education Location Program (HELP), which provides comprehensive web-based information and telephone advising about all UW institutions. Currently UW HELP and HELP-Online focus primarily on new freshmen admission. With additional resources, UW HELP could expand to become the resource for statewide transfer information and a connection point for non-traditional, out-of-state residents seeking information about coming to or returning to Wisconsin as transfer students.

5. Support Transfer Advising

Increase the number of institutional transfer advisors that maintain and evaluate transfer course information and course equivalency information. Currently TIS and most UW institutions have focused on transfer data for lower level/freshmen/sophomore classes. Adding transfer information for all undergraduate courses to TIS, and keeping it updated and current, will require additional staffing, but could serve the swirling population of transfer students that transfer later in their college careers.